



STATE OF IOWA

GOVERNOR KIM REYNOLDS
LIEUTENANT GOVERNOR ADAM GREGG

IOWA COMMISSION OF VETERANS AFFAIRS
ELIZABETH LEDVINA, CHAIR

IOWA VETERANS TRUST FUND CALENDAR YEAR 2023 REPORT

Per Iowa Code Chapter 35A.13
Annual Report to the Iowa General Assembly
January 15, 2024

OVERVIEW OF THE IOWA VETERANS TRUST FUND

This report fulfills the requirements of Iowa Code 35A.13, section 9:

The commission shall submit an annual report to the general assembly by January 15 of each year concerning the veterans trust fund created by this section. The annual report shall include financial information concerning the moneys in the trust fund and shall also include information on the number, amount, and type of expenditures, if any, from the fund during the prior calendar year for the purposes described in subsection 7.

Veterans must meet specific income and asset guidelines to qualify for Trust Fund assistance. Initially, the veteran and their family must have a household income below 300% of the Federal Poverty Guidelines (FPG). Some areas of assistance have a lower qualifying asset level. This is to prevent the over execution of available funds while focusing on the veteran population with the greatest need.

Some veterans are only eligible for one category of assistance, such as unemployment assistance, while other applicants apply for and are eligible for multiple areas of assistance based on their needs. For example, a veteran requesting housing repair could also qualify for dental assistance. Applications for assistance may be deferred because the veteran has not provided sufficient evidence to warrant approval or denial, but have indicated they will provide the needed eligibility evidence.

The Iowa General Assembly has determined areas of eligible expenditures for Iowa veterans:

- Travel expenses for service-related medical care
- Unemployment or underemployment assistance due to service-related causes
- Job training or tuition assistance
- Assistance with vision, hearing, dental care, durable medical equipment, and prescription drugs
- Counseling and substance abuse services
- Emergency vehicle and housing repair
- A One-Time vehicle replacement, not exceeding \$5,000 or the value of the vehicle.
- Transitional housing in an emergency
- Emergency room and ambulance transportation assistance
- Funding to determine whether a deceased veteran is the father or mother of a child
- Funding for family support groups
- Grants for providing honor guard services at veteran's funerals
- Homelessness one-time rental housing assistance

SEE IOWA ADMINISTRATIVE CODE 801, CHAPTER 14 FOR ADDITIONAL DETAILS ON THESE AREAS OF ASSISTANCE.

During the 2008 Legislative Session, HF 2359 was signed into law authorizing the creation and sale of four new Iowa Lottery tickets to benefit the Iowa Veterans Trust Fund. In early July of 2008 the first scratch-off ticket and the first pull tab tickets were introduced for public sale. First quarter sales met expectations, and by October 2008, the first \$992,771.80 was deposited into the principle balance of the Trust Fund account. It is anticipated that these tickets will provide between \$2 - \$3 million dollars annually in additional principle revenue.

From 2007-2011, Iowa Veterans Trust Fund operated exclusively on interest earned from the Iowa Lottery Principle Fund. Over time, this level of funding was deemed insufficient to meet program demand. In 2012, IDVA Director (Brig. Gen. Jodi Tymeson) identified the need for more funding and requested legislation for an annual deposit of \$500,000 from the Lottery Principle Fund to supplement interest available to meet demand.

Trust Fund applications have substantially increased, due in part to the current economic conditions and publicity from the Iowa Lottery. During 2011, the Trust Fund interest balance was depleted and a waiting list was implemented. Legislative action in the 2012 session corrected this situation.

The following information is provided by the Iowa Lottery:

Lottery Proceeds to Veterans Trust Fund Near \$40 Million

The lottery proceeds to the Iowa Veterans Trust Fund are nearing a major threshold, now totaling nearly \$40 million.

A portion of the Iowa Lottery's annual proceeds has been dedicated to the Veterans Trust Fund since July 2008 to benefit our state's veterans and their families.

With the lottery's most recent transfer to the fund in October 2023, lottery proceeds to the IVTF now total \$39.9 million. In addition, the lottery highlights the IVTF throughout any given year, with proceeds messaging and often during appearances at community festivals, sporting events, and veterans gatherings.

The lottery's support for the Iowa Veterans Trust Fund is noted on the Lottery Gives Back page of the Iowa Lottery's website here: <https://www.ialottery.com/Pages/Pressroom/IALotteryGivesBack.aspx>

Five-Year Recap of Lottery Annual Transfers to IVTF

<i>FY 2020</i>	<i>\$2,500,000</i>
<i>FY 2021</i>	<i>\$2,500,000</i>
<i>FY 2022</i>	<i>\$2,500,000</i>
<i>FY 2023</i>	<i>\$2,500,000</i>
<i>FY2024</i>	<i>\$2,500,000</i>



(*The Iowa Lottery's annual transfer to the IVTF for FY 2024 was made in October 2023.)

DEPOSITS

<i>Calendar Year</i>	<i>Principle Deposit (not spendable)</i>	<i>Deposits</i>	<i>Calendar Year</i>	<i>Spendable Interest</i>	<i>Deposits</i>
2020		\$2,500,000.00	2020		\$319,401.68
2021		\$2,500,000.00	2021		\$97,256.88
2022		\$2,500,000.00	2022		\$259,770.45
2023		\$2,500,000.00	2023		\$1,551,907.02
				1/25/23	\$115,062.81
				2/28/23	\$98,669.79
				3/24/23	\$114,875.29
				5/01/23	\$114,802.20
				5/31/23	\$126,912.43
				6/28/23	\$111,528.90
				7/28/23	\$125,596.31
				8/31/23	\$133,308.53
				9/28/23	\$147,159.71
				10/24/23	\$150,241.52
				11/29/23	\$159,717.50
				12/21/23	\$154,032.03
Grand Total		\$10,000,000.00	Balance a/o Dec. 30, 2023		\$1,454,626.11

<i>Calendar Year</i>		<i>Income Tax Check-off Deposits</i>
2018	1/15/20	\$33,140.50
2019	1/12/21	\$37,610.00
2020	1/13/22	\$37,572.50
2021	1/13/23	\$37,107.00
Grand Total		\$145,430.00

EXPENDITURES

Trust Fund expenditures can be separated into three separate categories: (1) Survivor Outreach Program, (2) Honor Guard reimbursement, and (3) Iowa Veterans Trust Fund.

In January 2020, the Veterans Affairs Commission recognized costs of services had escalated since 2012 due to regular inflation, along with other circumstances, such as the 2019 Derecho, 2020 COVID epidemic and resulting global supply chain challenges and increased consumer prices. With these increasing financial burdens on veterans in mind, the Commission made practical changes that adapted the program to increase eligibility to funds for veterans and military families. The increased demand subsequently created an unprecedented influx of application requests for assistance.

In late 2021, the Iowa Veterans Commission proposed legislation for an annual increase of \$300,000 from the Lottery Principle Fund, to a total suggested annual deposit of \$800,000 for FY23 and beyond. This was included in the Commission's Legislative Priorities for 2022. While the measure passed Veterans Affairs Committees unanimously in both chambers, the bill (HF 2293) did not make the floor for a final vote. As a result, the Trust Fund deposit for FY23 remained at \$500,000 and was depleted by October 2022.

The Iowa Commission of Veterans Affairs then voted in November 2022 deeming it prudent to postpone the acceptance of any future requests until the addition funds were available.

In May 2023, the Iowa Commission of Veterans Affairs resumed processing trust fund applications again with the trust fund interest balance increasing.

A breakdown of assistance per category is illustrated in the tables below:

Table 1: CY2023 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2023
Unemployment	0	\$0.00
Housing Repair	23	\$88,910.57
Dental Assistance	32	\$118,114.26
Vehicle Repair	35	\$53,124.65
Vehicle Replacement	6	\$25,309.00
Education Assistance	1	\$1,900.00
Emergency Medical	1	\$2,555.00
Durable Equipment	6	\$15,274.93
Transitional Housing	0	\$0.00
Audiology	0	\$0.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	0	\$0.00
Counseling Services	0	\$0.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	190	\$81,325.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	291	\$386,513.41

Table 2: CY2022 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2022
Unemployment	0	\$0.00
Housing Repair	80	\$437,220.77
Dental Assistance	146	\$504,122.34
Vehicle Repair	130	\$274,470.82
Vehicle Replacement	20	\$87,894.50
Education Assistance	6	\$17,276.00
Emergency Medical	3	\$4,405.94
Durable Equipment	13	\$44,570.90
Transitional Housing	0	\$0.00
Audiology	2	\$1,885.00
DNA testing	0	\$0.00
Travel Assistance	1	\$1,000.00
Vision Assistance	4	\$1,552.90
Counseling Services	2	\$1,500.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	115	\$50,950.00
Survivor Outreach Program	1	\$62,500.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	521	\$1,487,464.17

Table 3: CY2021 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2021
Unemployment	1	\$1,000.00
Housing Repair	85	\$393,281.70
Dental Assistance	133	\$417,842.53
Vehicle Repair	142	\$302,053.59
Education Assistance	4	\$14,064.00
Emergency Medical	6	\$5,770.94
Durable Equipment	8	\$10,585.12
Transitional Housing	0	\$0.00
Audiology	2	\$6,000.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	2	\$532.85
Counseling Services	0	\$0.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	217	\$97,975.00
Survivor Outreach Program	1	\$26,200.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	601	\$1,275,305.73

Table 4: CY2020 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2020
Unemployment	7	\$10,000.00
Housing Repair	57	\$127,540.66
Dental Assistance	62	\$217,255.01
Vehicle Repair	88	\$110,886.47
Education Assistance	6	\$5,243.45
Emergency Medical	6	\$7,154.29
Durable Equipment	9	\$14,120.91
Transitional Housing	0	\$0.00
Audiology	2	\$1,885.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	2	\$1,523.75
Counseling Services	2	\$1,500.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	193	\$75,300.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	521	\$1,487,464.17

FOR QUESTIONS ABOUT THIS REPORT:

Elizabeth Ledvina, Chair, Iowa Commission of Veterans Affairs
eledvina@tamacounty.org (641)-484-3160

Melissa Miller, Trust Fund Administrator, Iowa Department of Veterans Affairs
melissa.miller2@iowa.gov (515)-727-3443

Todd M. Jacobus, Commandant, Iowa Department of Veterans Affairs
todd.jacobus@ivh.state.ia.us (515)-727-3444